

# Metrics Management

Measure, track and report your organization's ESG & Sustainability metrics.



Environmental, Social, and Governance (ESG) performance is an increasingly important metric for capital markets. Strong ESG and Sustainability performance leads to longer-term performance and returns, lower risks, and greater resiliency. Therefore, stakeholders, including investors, customers, rating agencies, NGOs, and the public, focus more on a company's ESG-related disclosures and investments.

Companies can expect greater scrutiny on their ESG and Sustainability goals. And, as investors demand investment grade data and regulations may force more mandatory disclosure reporting, the information needs will be far greater than what was required for Corporate Social Responsibility (CSR).

Evotix's Metrics Management module supports companies measure, understand, and communicate their environmental, social, and governance performance. It streamlines the management of data collection, reporting, and analysis of ESG and sustainability performance metrics.

Companies can also define targets for their metrics. Setting targets and comparing them with actuals enables companies a data driven way to assess the overall effectiveness of their ESG and Sustainability efforts.

NET WATER  
CONSUMPTION (ML)

14900



EMPLOYEE TURNOVER

230



HIGH SEVERITY INCIDENTS

4



Automated data collection and calculations



Measure ESG & Sustainability performance



Disclosure reporting with confidence



Flexibility to respond to evolving requirements

# Core Functionalities

The module has a pre-configured workflow that provides instant useability. An overview of the workflow is explained below:



## Setup Metrics

- Metrics determine what data is to be collected, how often, by who, and for which locations. Metrics can be any textual, numeric and Yes/No data that a company wants to collect and report on, such as carbon footprint, energy consumption, water conservation, workforce diversity and more.
- A significant advantage of Evtix's Metrics Management module is the ability to specify how the data needs to be collected or generated.

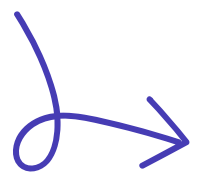
- **Calculated Metrics** enables data already in any other module in the Evtix platform to be drawn upon to calculate the metric, eliminating the burden of double-handling data, and ensuring data consistency.
- **Formula Metrics** performs mathematical functions on the data collected for other Metrics, combining or adjusting data to form a new Metric for reporting.
- **User input** – through a personalized data entry portal.

Metrics can be grouped by Metric Groups to simplify data entry, filtering, and reporting.

- The system allows Metrics to have a **Variation % Threshold** defined to improve quality. If the entered value deviates from the previously collected data by more than the Variation % Threshold during data entry, the user must enter an explanation.

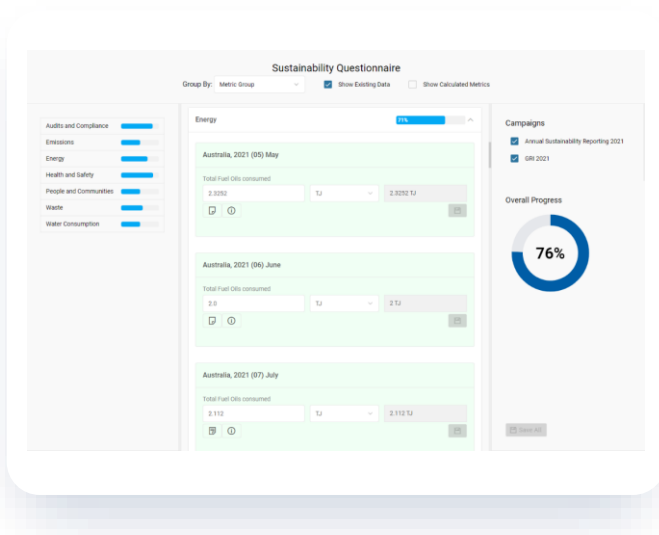
## Setup Campaigns

- Campaigns drive the collection of Metric data. Campaigns are set up as a targeted group of qualitative and quantitative Metrics to be collected across a reporting time period or initiative. A data reviewer can also be nominated within a campaign. They will automatically receive a notification when data has been added. Their role will be to review that data, which they can accept or reject. Notifications are sent to the relevant people when the data is rejected.



## Collect Data

- Once a Campaign is set up, the system sends users a data collection email notification. Users can access a personalized questionnaire view from the email, which provides a rich and intuitive way to enter their data. Users can dynamically view the progress of their data entry requirements within the portal for any active campaigns allowing them to complete the task with less effort. Users can also identify if the data they are entering is Actual or an Estimate.
- Users can also download an import template, fill in the required data offline, and import it back into the system later. The Campaign owner receives a system-generated email once all metrics data collection is completed.



## Review and Approve

- The review and approval process assures data validity and accuracy. A full audit trail tracks any changes made to the data. Closing a time period will prevent updates to the campaigns and data captured for that period.

## Targets

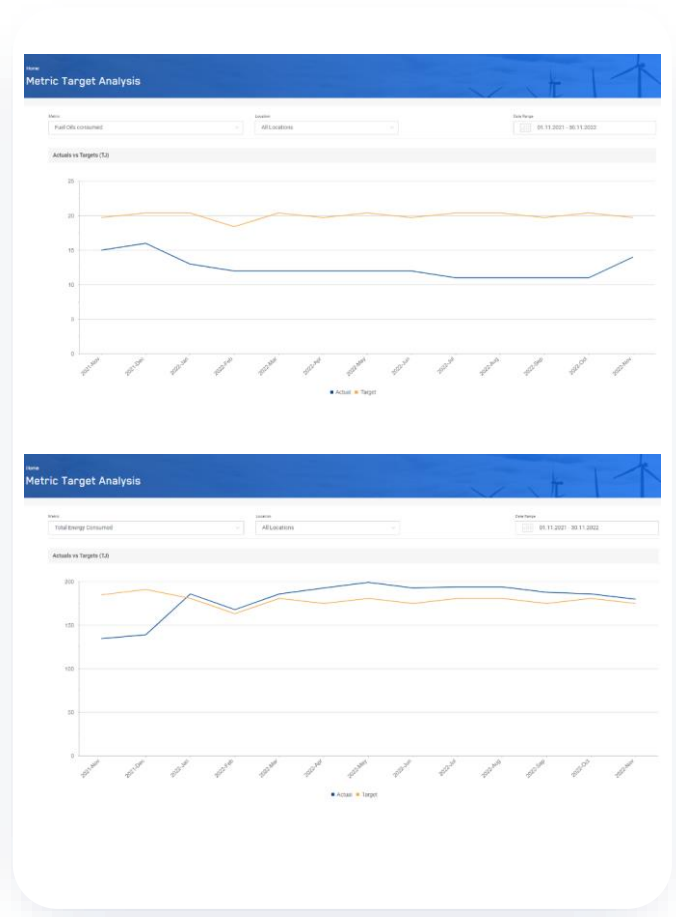
- Allows the management and tracking of Targets for any Metric. Targets are then available for analytics and reporting. It will also be easier to analyze your metrics with the improved Visualizations.

## Reporting Frameworks

- Eases the burden of supporting ESG Reporting and provides financial grade auditable data required for ESG disclosure reporting. Able to link a single Metric to multiple reporting framework or regulation elements (e.g., GRI, SASB, TCFD), and a reporting framework can be linked to various Metrics.

## Report and Analyze

- Reports and dashboards are available to monitor the performance and trends of your metrics. Reports to communicate performance to stakeholders, regulators, and industry standards such as GRI, CDP, and DJSI can be built using our reporting tools.



# Data Analytics, Reports, and Dashboards

The module provides reporting and data analytics capabilities to:

- Automatically save details from a record as a formatted PDF.
- Transform data into Visualizations on the fly.
- Query, analyze and build custom reports and dashboards with pivot tables and charts, including geo-maps using any data captured in the module.

We have the following pre-configured reports and dashboards available:

Generate reports for campaigns, time period comparisons, metrics, and metric groups across organizational hierarchies and any other categorization defined.

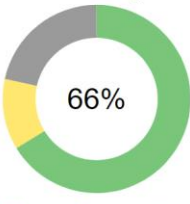
Home

## Campaign Progress

Campaign Owner: Ackerley, Bethany Campaign: Annual Sustainability Reporting 2022

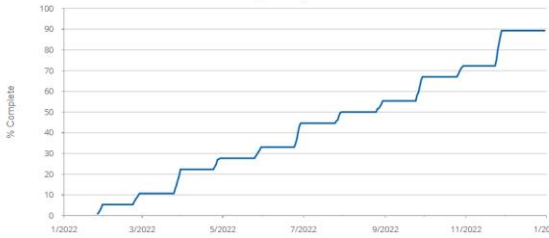
Metrics
25
Locations
4
People
2

### Data Collection Progress



66%

### Data Entry Activity Monitor



#### Progress by Metric Group

Metric Group	Completed (%)	Deviations (%)
Audits and Compliance	91	0
Emissions	0	0
Energy	66	22
Health and Safety	68	0
Waste	94	21
Water	41	30

#### Progress by Location

Location	Completed (%)
Alaska	0
Colorado	0
Queensland	0
Western Australia	0

Home

## Metrics Analysis

Metric	Total	Trend
Accidental discharge of water and tailings	18 MI	
CO2-e Emissions (Scope 1)	2,521 t	
CO2-e Emissions (Scope 2)	121,429 t	
Count of High Severity Incidents	3	
Lost days	389	
Natural Gas Used	1,280 TJ	
Near Miss Reporting	150	
New Employees	36	
No. of Audits Conducted	14	
Renewable Electricity	4,499 kWh	
Total CO2e Emissions	123,951 t	
Total Energy Consumed	1,393 TJ	
Total fines paid	47,219	
Total Number of Community Complaints	48	
Total weight of hazardous waste generated	31,618 t	
Total weight of hazardous waste recycled	11,277 t	

**Campaign Summary:** provides a simplified list showing all the Metrics data captured for a campaign, allowing analysis of the data on specific location(s) associated with the Campaign.

**Campaign Progress Dashboard:** gives an overview of how the data collection drive is tracking for a Campaign. Providing insights into overall collection progress and the ability to analyze activity trends.

**Metrics Analysis dashboard:** provides a snapshot of the data collected, showing sparkline trends for the date range and location selected.

**Metric Data by Reporting Framework:** provides a consolidated collection of metrics and their data according to the selected Reporting Frameworks structure.

**Reporting Framework Exception Report:** a list of Framework element that are not linked / associated with a Metric.

**Metric Target Analysis:** provides an in-depth analysis of a Metric against the Targets defined.

## Integrated Processes

The Metrics Management process is integrated with all other modules to provide a completely holistic solution that can calculate metrics from other relevant modules

Our solution is highly configurable, and the above forms, workflow, reports, dashboards, and integrated processes can be tailored or extended to suit your needs.



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# Let's chat

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Our Evotix team is passionate about applying market leading technology to create safer, smarter workplaces, partnering with organizations that value people's safety, communities and the planet.

As safety professionals and long-term leaders in the Verdantix EHS Green Quadrant, our deep and practical insight addresses your evolving needs, helping you achieve your health, safety and sustainability goals.

**Evotix: your all-around partner for the journey.**

